

**Unified Communications**  
**Request for Proposal**  
**For**  
**Basic UC Productivity Tools**  
**At**  
**Sample Company**

Updated 9-25-2007

Introduction:

*This RFP Toolkit is designed to assist in buying the right components and services to match your business needs for a specific Unified Communications Application area. This is a sample of the end product for one of eight UC Applications. The actual Toolkit includes an Excel workbook in which you enter information that customizes both a Word document (the RFP text) and a second Excel workbook (the feature response matrix). The Word document and Excel workbook can be edited as you please and then issued to the Suppliers for their responses.*

*You can review all eight of the UC Applications as well as a diagram how the various elements of the toolkit work by visiting the RFP site at [UCStrategies.com](http://UCStrategies.com).*

*Finally, please note that expert UC consulting service support is available at discounted prices when purchased in conjunction with the UC RFP Template Toolkit(s).*

*Thank you for considering these UC RFP Template Toolkits to support your investments in Unified Communications solutions and the related significant benefits.*

Use of this Document

*Paragraphs or sections marked with \*\*\* are to be customized to your Enterprise needs. You can visually scan for those sections or can use Edit-Find with \*\*\*.*

*\*\*\* Delete this and the following paragraph and replace with any language as to confidentiality, terms or use, ownership, etc.*

*Notice: This Request for Proposal Template is provided for your company's use in solicitation of Unified Communications Request(s) for Proposal(s) (RFP) and is governed by the terms and conditions of the license agreement accepted at [UCStrategies.com](http://UCStrategies.com).*

*This is a **SAMPLE ONLY** for evaluation prior to purchase of a licensed copy of the UC RFP Template Toolkit. It is prohibited to copy or distribute this document outside of your enterprise and for other than evaluation purposes.*

*For more information, please visit [UCStrategies.com](http://UCStrategies.com)*

## RFP for Sample Company

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## 1. Purpose of this RFP

The purpose of this RFP is to solicit bids for implementation and maintenance of Unified Communications (UC) capabilities in Sample Company. These capabilities will be applied to specific business processes and to the related employee, contractor, supplier and/or customer roles (also known as “jobs” or “communities”) in order to improve or optimize those business processes significantly.

This RFP includes sections and requirements for the following UC Capabilities:

### **Basic Unified Communications**

- Enterprise Presence
- Enterprise IM

### **1.1.      *Supplier Selection Guidelines***

Supplier selection will be based on the extent to which the Supplier's response demonstrates the ability for Sample Company to achieve these goals through implementation and reasonably effective and practical use of the proposed solution. The evaluation will be based on solution completeness, product capabilities, Supplier capabilities and reputation, and the forecasted financial results of implementing the requested solutions including TCO and ROI calculations.

Other criteria for Supplier selection include:

Selection Criteria 1

Selection Criteria 2

Selection Criteria 3

Selection Criteria 4

Selection Criteria 5

## 2. Responder/ Potential Supplier Instructions

This section will include the Enterprise's instructions to the respondents who are invited to respond to the RFP as the potential suppliers of the Solution.

### 2.1. Instructions to Suppliers

\*\*\* NOTE: It is assumed that most Enterprises have standard language and processes they wish to use. Please enter your enterprise's guidelines here. These should include some or all of the following:

- o Timeline for questions and for RFP response
- o Methods for submitting questions
- o Methods for response to questions from Suppliers (e.g. post to all Suppliers?)
- o Methods for submitting RFP response. This should specify such items as numbers of copies in each media (digital, paper, CD/DVD, as you prefer), types of file formats that are acceptable (e.g. will you accept Visio files, Microsoft Project files), etc.
- o Format for the responses, e.g.:
  - Textual Responses to questions to be submitted in a **separate** single Microsoft Word document with each response labeled with the appropriate section number from the RFP and with the question or request from the RFP copied into that document in advance of the answer(s).
  - Diagrams, illustrations, reference manuals, etc. should be included as digital electronic attachments to the submission, on CD or DVD media, or via URL to a web location from which our Enterprise can download or retrieve the materials.
- o Guidelines re ownership of responses (e.g. responses are property of Sample Company for Sample Company's use)
- o Timeline for evaluation and award
- o Timeline for implementation, if selected
- o Non-Disclosure and Confidentiality Conditions
- o Statement re "No obligation to award"
- o Requirements for demos if selected
- o Requirements for executive presentations if selected as finalist or for contract award.

## 2.2. Definitions

Throughout the document, the following terms are used, shown with Initial Caps:

**Mandatory:** This requirement, term or feature must be provided in the Solution in order for the Supplier to be considered for an award. If not specified as either Mandatory or Desirable, then Mandatory requirement is assumed, i.e. Mandatory is the default state.

**Desirable:** This requirement, term or feature is requested for inclusion in the Solution but is not Mandatory. Completeness, functionality and effectiveness of the Desirable items for Sample Company purposes will be the primary basis for evaluation of the Solution and Supplier for potential contract award, conditioned on meeting the Mandatory requirements.

**Supplier:** The firm that is responding to this RFP and that will have the contractual obligation to deliver the Solution.

**Producer:** The firm(s) that produce the software and hardware elements of this Solution.

**Solution:** The combination of software products, hardware products, customer software, network equipment, devices, services, licenses, documentation, methods, procedures or other elements that are required for complete implementation of the UC Application requested in this Proposal.

**Proposed, Proposal, or Proposed Solution:** The elements of the Solution that are proposed by the Supplier. Solution elements that are not Proposed must be shown as prerequisite or customer-provided elements.

\*\*\* (Add definitions if you wish)

### 3. Enterprise Overview

#### 3.1. Objectives of this RFP

##### 3.1.1. Purpose

The Sample Company seeks to achieve the following business benefits and outcomes as a result of implementing the products and solutions requested in this RFP.

Business Benefit 1

Business Benefit 2

Business Benefit 3

Business Benefit 4

To achieve these purposes, Sample Company requires the following Capabilities and Applications as described in the following sections 3.1.2 and 3.1.3.

##### 3.1.2. Capabilities

Sample Company requires the following Unified Communications Capabilities. In the written responses and detailed features and applications worksheets in Sections 4 -10, your firm will be asked to specify that your solution can and will perform these functions in the configuration proposed.

###### 3.1.2.1. Enterprise Presence

The ability for authorized users to visually observe the status of another person on the network is Mandatory.

Ability to adjust the user name or nickname displayed with the presence indication.

Ability for presence status to be “rich” in capabilities including at least the following:

- Number of modes of status sufficient to support optimal work habits, such as on-line, off-line, do not disturb, on a call/conference, busy, limited availability, etc.
- Manual adjustment of Presence status
- Automatic adjustment of Presence status based on calendar information, communication mode, device type, network connectivity status, location, type of activity, identity of other parties in communication, etc.
- Establishment of at least four (4) categories of presence that can be assigned to any other authorized user (manual setting Mandatory; automatic setting

Desirable) and that will determine what Presence information is provided to that other user.

- Ability for Sample Company to define and create other Presence indications including a unique color or symbol based on any determinable state (e.g. entering and order, talking to a person known to be a customer, etc.) is Desirable.

Ability for presence to be viewed in lists or groups based on user, admin or software assignments of groups.

Ability for presence to be determined across groups of persons, based on the highest level of availability for one or more members of that group.

Ability for initiation of any mode of communication from the presence indication, including IM, e-mail, calling, conferencing, collaboration, etc. Ability to escalate from one mode to another, as appropriate during a session.

Ability to limit the communication modes based on the presence status of the selected user (e.g. call user is not presented (or active) if the user is in do not disturb mode).

Ability for software applications to inquire on (view) presence status of a user or across a group of users and to assign, link or route communication events to a selected user under software control, with supporting interfaces and/or toolkits, is Desirable.

### **3.1.2.2. Enterprise Instant Messaging (IM)**

The ability for authorized users of the Supplier's system to send and receive Instant Messages (IM) to other authorized users.

Messages can be sent to a single individual user or to a group of users. Groups of users can be created dynamically by adding users to an existing IM session, or can be defined in advance as a list or group. Use of existing group definitions, such as in a directory (e.g. Active Directory) or in an e-mail system (e.g. Microsoft Exchange) is Desirable.

Ability to Federate IM with other specific enterprises or systems, i.e. provide secure IM functionality between Sample Company systems and other companies' IM systems.

Ability to Federate IM with public IM services or systems, i.e. provide IM functionality between Sample Company systems and public services including at least MSN Live, AOL IM, Yahoo! IM, and Google IM. This must be as secure as is possible with each public service.

Ability to initiate IM to a specific user from within any Microsoft Office application.

Ability for logging and archiving of the communications in all IM sessions for records management or regulatory compliance is Mandatory. Logging of IM sessions for only specific pre-identified users is Desirable. Logging of IM sessions under user control, if not specified is Desirable.

Ability for visual and audible alerts to the intended recipient upon arrival of an IM message is Mandatory. Mode(s) of alerts under user control.

Ability to create, send and receive IM from software applications, with supporting interfaces and/or toolkits, is Desirable.

### **3.2. Timeline for Resulting Project**

*\*\*\* Sample Company desires to begin implementation within <one (1) month> following the award of the RFP to Supplier. It is our objective to have a pilot group operational within <two (2) months or less> following the start of implementation, and to have the UC Application available to all relevant roles/jobs within <five (5) months> following the start of implementation. Supplier should address the ability to meet or improve on those targets in the Implementation section of the Response.*

### **3.3. Relevant Enterprise Background**

#### **3.3.1.1. Description of your Enterprise**

Enter text describing your Company (mission, customers, products and services, industry sector, etc. in the UC RFP workbook and it will be linked here.

Information about Sample Company can be found at our website: [\(Your Web Site URL\)](#)

#### **3.3.1.2. Numbers of Personnel and Users**

Sample Company employs approximately 6,500 personnel. Of this number, we require that at least 4,000 of our personnel will be able to use the Proposed Unified Communications base solution, i.e. Presence and Instant Messaging, within the Sample Company network.

#### **3.3.2. ROI Methods and Information**

##### **3.3.2.1. Preferred Formulae and Approaches**

*\*\*\* If your Enterprise has guidelines as to ROI calculations and methods, please include them here. If not, you could link to a web site that provides guidelines acceptable to your management team, such as [http://searchcio.techtarget.com/sDefinition/0,,sid19\\_gci214270,00.html](http://searchcio.techtarget.com/sDefinition/0,,sid19_gci214270,00.html).*

#### **3.3.3. TCO Methods and Information**

##### **3.3.3.1. Preferred TCO Model or Forms**

*\*\*\* If your Enterprise has guidelines as to TCO calculations and methods, please include them here. If not, you could link to a web site that provides guidelines acceptable to your management team.*

##### **3.3.3.2. Budgetary Cost per Server**

Sample Company uses a budgetary cost of \$15,000 for the cost of acquiring and installing a Windows-based Server and a budgetary cost of \$25,000 per year as the cost of managing a Windows-based Server, including administration, monitoring, updates, patches, security management, and maintenance.

*\*\*\* Provide other relevant information as appropriate.*

### **3.3.3.3. Admin Methods**

\*\*\* Describe the administrative environment in which the proposed systems must operate, such as: directories and databases used; interfaces used; remote access methods and policies; reporting and dashboard practices in place or planned; the degree and methods for user self-service; the help desk methods and tools; etc.

### **3.3.3.4. System Management Methods**

\*\*\* Describe the system management methods in which the proposed systems must operate, such as: monitoring software and protocols used; alarming and reporting tools and methods; security interfaces or methods to which the systems must interface, etc. Note: This information is, of course, sensitive, so perhaps can be held for discussion only with the finalist(s).

## **3.4. Current Enterprise Technology Environment**

### **3.4.1. Relevant software, hardware, networks, customizations, integrations**

\*\*\* Provide descriptions and diagrams of the current, relevant software, hardware, networks, customizations, etc. to which the proposed systems must interface. For example, provide a list (in text or as an attachment or appendix) of the PBXs to which the proposed UC solution must interface with either or both of (a) standard telephony to route and receive calls to the PBX(s), or (b) CSTA integration to allow call control, presence status, dial plan integration, etc. If a multi-location deployment, provide diagrams of the networks between the sites with indications of the number of planned UC users at each site and the UC applications that those personnel are expected to use.

**THIS CONCLUDES THE SECTION DESCRIBING OUR ENTERPRISE'S REQUIREMENTS. THE FOLLOWING SECTIONS – SECTIONS 4 THROUGH 14 – ARE TO BE COMPLETED BY EACH SUPPLIER WHO RESPONDS TO THIS RFP.**

## 4. Executive Summary

Please provide a three page summary of the Solution Proposal, preferably in complete sentences rather than bulleted lists. Please include the following sections:

- **Solution Description:** What the solution does and how it does this.
- **Benefits, Costs and ROI from the Solution:** Describe the benefits in precise, quantified terms; describe the prices and expected operational costs; indicate the expected ROI (Benefits vs. costs) for the Solution.
- **Implementation and Maintenance:** Describe the methods and timeline for implementation; describe maintenance methods, terms and conditions.
- **References:** Summarize at least three other enterprises of similar size and use cases who have successfully implemented this Solution.
- **Miscellaneous:** Include other information of interest and pertinence for Sample Company executives.

## 5. Solution Description

### 5.1. *Capabilities of the Proposed System*

#### 5.1.1. Application Functionality

Describe the functions of the software applications included in your Solution Proposal

#### 5.1.2. User Experience Description and Illustrations

Describe the user interfaces and the use of those interfaces to provide a productive user experience. If possible include screen images, flash demos, links to web demonstrations, or other tools to illustrate these points.

#### 5.1.3. Management and Administrative Functionality

Describe the methods and tools proposed for the Solution.

### 5.2. *Solution Use Cases Proposed*

#### 5.2.1. User Categories

Indicate which of Sample Company roles/jobs (employees, customers, prospects and/or business partners) will use or interact with the Solution. Specifically state if this does not include all of the roles/jobs defined in our requirements and/or if it includes additional roles/jobs.

#### 5.2.2. Use Cases

Describe the primary use cases for each role/job and indicate how that use case will improve the associated business process(es). Please be as specific as possible as to the improvement or optimization of the processes, since this will be the basis for your ROI calculations and representations that we use in our selection.

### 5.2.3. Elements of the Solution

Provide a brief description of each element of the proposed Solution. Where appropriate, please refer to supporting documentation and either attach those documents or provide the URL for those resources on your web sites (with passwords, if required). Categories for inclusion in this section, as appropriate:

- Software Packages, Products or Modules
- Customization of Software Packages, Products or Modules
- Supporting Hardware included and priced in the Proposal
- System Integration services required and included in the Proposal
- Implementation Methods, Scope and Duration
- Training and Change Management services included in the Proposal
- Metric Tracking and Reporting tools included in the Proposal
- Customer-provided Solution Elements, e.g. server hardware, devices, facilities, integration tasks, etc.
- Prerequisite Software, Infrastructure, Systems, etc.

## 6. System Design Summary

### 6.1. *Solution Schematics*

#### 6.1.1. Software Module Diagrams and Interoperability

Provide one or more (as needed) illustrations showing all software packages and modules needed for the Solution, showing:

- Specific interoperation between the modules
- Interoperation with prerequisite system elements
- Physical distribution of the software modules on servers, routers, appliances, etc. by location and geography as appropriate.

#### 6.1.2. Network Diagrams

Provide one or more (as needed) illustrations showing the network topology and connectivity of the Solution, showing:

- Specific network elements included in the Proposal
- Interoperation with existing or pre-requisite network elements
- Interoperation with external networks (PSTN, Internet, Cellular, Wireless LAN/WAN, etc.)

#### 6.1.3. Protocol Diagrams

Provide one or more (as needed) diagrams, possibly as overlays to the Software Module diagrams and/or Network diagrams that define the protocols that will be used by the

Solution. Where appropriate, provide a reference to documentation – public or proprietary – that defines each protocol used.

If selected as a finalist, the Supplier will be required to provide additional information defining the Internet Protocol port assignments for each protocol used with each software module provided in the Solution.

## **7. Implementation Summary**

### **7.1. *Phases and Timelines***

Describe the implementation plan for the proposed solution with the associated timeline and resource requirements for each Phase.

#### **7.1.1. Timeline**

Show the total elapsed time for the Implementation, expressed in terms of weeks elapsed from the approved and funded start date, following a contract award and signing.

Segment the Implementation into phases and indicate the elapsed time for each phase in terms of weeks elapsed.

Indicate the total “slack” time in the plan, both in weeks or elapsed time and as a percent of the total Implementation plan.

Indicate which activities are on the critical path of the proposed implementation plan.

#### **7.1.2. Resources**

For each phase, please describe the:

- Objectives of the Phase
- The major elements of the Statement of Work for the Phase
- Resources required for each Phase, showing quantity, skills, and duration for:
  - The resources included in this proposal
  - Resources that must be contracted separately
  - Resources required from Sample Company
- Completion or signoff criteria for each Phase
- Test plans or other certification methods to validate the completion criteria.

It is acceptable, but not required, to submit the timeline and resource plan for the phases as some form of electronic planning tool, such as Microsoft Project. Sample Company typically uses <Name of project planning tool> should that be available to you.

## **8. Maintenance Summary**

### **8.1. Proposed Maintenance Plan**

Describe your maintenance plan in terms of the following:

- Scope of maintenance coverage, e.g. remote support; on-site support; diagnosis; repair; software and/or hardware fixes; remedial patches or upgrades; new release upgrades; other factors provided.
- Coverage Hours for the maintenance coverage. Indicate the scope of coverage outside of Coverage Hours and indicate which scope elements are at additional charge, if any.

### **8.2. Maintenance Plan Details**

Provide statistics representing the typical experience with the Proposed Solution in terms of numbers of major (e.g. outages or service-affecting) and minor (e.g. degraded functionality) service events per year and the typical duration of such outages or events. Please indicate this for the entire Solution as well as for the main component elements, if applicable.

Indicate the procedures for patches or updates to your proposed software or firmware for mandatory and optional patches or updates. Indicate if installation of those patches or updates is included in the proposed maintenance service or is chargeable. Indicate if the installation of the patches or updates can be performed by Sample Company staff members.

Indicate the policies and procedures for patches and updates to your software or firmware related to security and virus protection for the proposed solution. Indicate if your company monitors alerts and other notices from the producer of the software or firmware and indicate the target and maximum time periods for notifying Sample Company of the validation and authorization for installation on the proposed systems. Indicate if the installation of the patches or updates can be performed by Sample Company staff members.

Indicate any required remote network access by Suppliers or Providers personnel to the Solution elements during implementation and maintenance. If such is required, please indicate the methods provided to assure security and network integrity for Sample Company.

### **8.3. Maintenance Plan Options**

Please present any options that you wish Sample Company to consider for maintenance as alternatives or additions to the Proposed Solution. These might include variations in hours of coverage, inclusion of software upgrades in the maintenance contract (if not

already proposed), managed or hosted service options, etc. Please include any options you believe to be pertinent to Sample Company, though response to this item is optional.

## **8.4. Terms and Conditions of Proposed Plan**

### **8.4.1. Service Level Agreements**

Sample Company requires that this Solution will not be out of service to 100% of the users for more than <one (1) two-hour (2-hour) duration during normal business hours in any 6-month calendar period>. We also require that the Solution will not be significantly degraded to <100% of the users or unavailable to 20% or fewer users for more than two (2) eight-hour (8-hour) periods in any 6-month calendar period.>

Please confirm that your Proposed Solution will meet these targets.

Please indicate the Service Level Agreements, by type of event, that you are proposing for this solution in terms of the elapsed time from notification of a service event (automatic or via alert from Sample Company) for:

- The assignment of a qualified service representative or engineer to the reported problem.
- The arrival on-site, if required, of a qualified service representative
- The resolution of the service event by restoration of service or implementation of a viable work-around.

### **8.4.2. Liquidated Damages**

Please indicate the liquidated damages, penalty payments, maintenance charge credits, or other compensation that your firm will provide to Sample Company in the case that the Service Level Agreements are not met.

### **8.4.3. Term and Renewal**

Please indicate the term of the proposed maintenance agreement and the conditions for renewal.

Please indicate if other maintenance agreement terms are available and, if so, what differences in maintenance pricing are associated with those alternate terms.

## **9. Customer Responsibilities**

### **9.1. Prerequisite Systems, Infrastructure, Environment**

Specify the prerequisite environment for the Proposed Solution. Please specify all required elements, such as:

- Network capacity
- Network connectivity

- Network protocols
- Network bandwidth
- Network latency
- Firewalls, security devices/software, gateways, etc.
- PBX or other communication system capabilities
- E-mail or other messaging system capabilities
- Directory and/or database system capabilities
- End User Devices (PCs, Cell phones, wireless devices) capabilities
- Environmental attributes (and associated Solution characteristics
- Space and Floor Loadings
- Other, as may be required.

## **9.2. Customer-provided Solution Elements**

Specify the elements of the Proposed Solution to be provided by Sample Company, such as:

Staffing during implementation, indicating numbers and skill levels by implementation phase, showing expected person-days for each staff position or skill level.

Staffing during the operation and maintenance life-cycle phase, indicating numbers and skill levels, showing expected person-days per calendar month for each staff position or skill level.

Equipment and Software, such as servers, operating systems, routers, gateways, monitors/keyboards, maintenance software, reporting software, or other similar elements.

Facilities for Solution elements and for the Supplier's implementation or maintenance personnel, if required.

# **10. Product and Solution Detail Responses**

## **10.1. Refer to attached Excel Workbook**

Please respond to each requirement stated in the attached Excel workbook. If prompted to "Update Links" when you open the workbook, select "No" (all the information in the workbook is already updated). Now, please proceed through each worksheet (tab) in the document and respond to each question or requirement with Y or N (Yes or No, plus the answers as to quantity, customization and explanation, if appropriate for each row.

For any answer that is not a complete, "Yes" response to the requirement, please mark that answer as "No" and indicate in the comments section whether your solution provides partial compliance "as is" or could provide complete responsiveness with specific workarounds, with integrations to other software or systems, or with the addition of some custom software.

Please be sure to save the workbook each time you update it and to save it before you submit it as part of your RFP response. Please send BOTH the updated Workbook as well as your written responses and other materials, as instructed in Section 2 of this RFP.

## 11. Pricing

Please provide a table or document in editable electronic format with all pricing information for a period commencing with the implementation phase and continuing for a period of three (3) years following acceptance of the implementation. Pricing must show line item detail for any item that has a separate price, even if sold as a “bundle”.

Include all of the following, as applicable:

- Software licensing (indicate if perpetual or annual license)
- Software upgrades or software assurance program
- Software maintenance or software assurance program
- Hardware, gateways, network upgrades, and associated equipment
- User devices and appliances (e.g. USB phones, wireless devices, etc.)
- Hardware and device maintenance agreements.
- Professional services required for your Proposal, such as:
  - Implementation
  - Training
  - Support, if separately priced
  - Customization of the base software
  - Customization of Unified Communication Applications
- Miscellaneous: Any elements required for the Solution that are not listed above.
- Note: For any items above that must be customer-provided or purchased from a third party, please provide an estimate of that cost/price and provide valid names and contact information for at least two (2) suppliers that would offer such items for approximately the costs/prices you indicate (+/- 10% is acceptable range).

## 12. ROI and Cost of Ownership and ROI Calculation

Please provide a quantitative estimate of the ROI of your proposed solution for a three (3) year period following installation. Please indicate the assumptions made regarding current costs and expenses. Please indicate the logic and assumptions on which the saving or benefits are estimated and calculated. Please show the payback period, ROI and the IRR for the estimated benefits.

Please include a summary of the total costs of ownership for the Proposed Solution, including purchase, licensing and implementation costs as well as estimated annual costs for operation during the three (3) year period.

### **13. Proposing Company Background**

Provide the background information for the Supplier enterprise, including:

- Type of entity
- Year incorporated
- Financial results for entire firm for current and two prior years
- Financial results for relevant unit or division for current and two prior years
- Locations at which Supplier operates
- Locations that will contribute to the Solution
- Certifications of Supplier firm
- Authorizations (e.g. distribution rights from Producers) of Supplier firm
- Total staff of Supplier firm
- Number of staff relevant to the Solution
- Number of staff contributing to Proposed Solution
- Certifications of Staff contributing to Proposed Solution
- Number of similar Solution installations by Supplier firm
- At least three relevant reference enterprises that have been installed and maintained by Supplier firm.

### **14. Producing Company Background**

Provide the background information for the Producer enterprise (complete for each Producer representing more than 25% of total software and hardware price), including:

- Type of entity
- Year incorporated
- Financial results for entire firm for current and two prior years
- Financial results for relevant unit or division for current and two prior years
- Locations at which Producer operates
- Locations that will contribute to the Solution
- Certifications of Producer firm, e.g. ISO certifications
- Staff of Producer firm assigned to relevant Proposed Solution elements
- Number of staff contributing to Proposed Solution
- Number of similar Solution installations by Producer firm
- At least three relevant reference enterprises that have been installed and maintained by Producer firm.

## 15. Miscellaneous

\*\*\* Use this section to add any additional instructions or requests.

SAMPLE ONLY

## Unified Communications Capabilities and Applications

Updated: Sept. 28, 2007

### Capabilities

*Note: This form is produced from the Excel UC RFP Workbook that is part of the UC RFP Template Toolkit. The Workbook determines which technology elements are required for the specific UC Application for which you are issuing the RFP. You can see a diagram of how this works at: [UCStrategies.com](http://UCStrategies.com)*

| Category | Category Capability                                                                          | Mandatory or Desired M or D | Solution Provides? Y or N | (If Applicable) Quantity | Customization Required? | Explanations or Exceptions or Scope of Customization |
|----------|----------------------------------------------------------------------------------------------|-----------------------------|---------------------------|--------------------------|-------------------------|------------------------------------------------------|
|          | <b>Enterprise Instant Messaging</b>                                                          |                             |                           |                          |                         |                                                      |
|          | <b>Basic IM Functionality</b>                                                                |                             |                           |                          |                         |                                                      |
|          | Authorized Users Can:                                                                        |                             |                           |                          |                         |                                                      |
|          | Send IM to Users                                                                             | M                           |                           |                          |                         |                                                      |
|          | Receive IM from Users                                                                        | M                           |                           |                          |                         |                                                      |
|          | IM Conversation proceeds in separate window                                                  | M                           |                           |                          |                         |                                                      |
|          | IM Conversation is secured by appropriate IP protocol (indicate protocol(s) included)        | M                           |                           |                          |                         |                                                      |
|          | User can edit IM message before sending                                                      | M                           |                           |                          |                         |                                                      |
|          | User can paste objects, files and URLs into IM message before sending                        | M                           |                           |                          |                         |                                                      |
|          | User can set preferences for IM messages -- font, color, etc.                                | D                           |                           |                          |                         |                                                      |
|          | User can establish an IM name that is shown to others (other than corporate or e-mail addr). | M                           |                           |                          |                         |                                                      |
|          | User can provide picture or other graphic that is seen by others during IM session.          | D                           |                           |                          |                         |                                                      |
|          | User can establish multiple IM names and assign them to specific uses.                       | D                           |                           |                          |                         |                                                      |
|          | User can select and assign a specific picture or graphic to each other IM user.              | D                           |                           |                          |                         |                                                      |
|          | IM messages are time-stamped                                                                 | M                           |                           |                          |                         |                                                      |

| Category | Category Capability                                                                         | Mandatory or Desired M or D | Solution Provides? Y or N | (If Applicable) Quantity | Customization Required? | Explanations or Exceptions or Scope of Customization |
|----------|---------------------------------------------------------------------------------------------|-----------------------------|---------------------------|--------------------------|-------------------------|------------------------------------------------------|
|          | Send IM to group of Users                                                                   | M                           |                           |                          |                         |                                                      |
|          | Send IM to group of Users defined by e-mail (e.g. Exchange, Domino, etc.) distribution list | M                           |                           |                          |                         |                                                      |
|          | Sending IM to Group opens IM conversation window containing Users                           | M                           |                           |                          |                         |                                                      |
|          | New incoming IM provides visual (flashing) and audio (tone) alert.                          | M                           |                           |                          |                         |                                                      |
|          | Clicking on visual alert accesses conversation window                                       | M                           |                           |                          |                         |                                                      |
|          | User can turn alerts on or off by type of alert                                             | M                           |                           |                          |                         |                                                      |
|          | User can save IM conversation to file (not using copy/paste)                                | M                           |                           |                          |                         |                                                      |
|          | Conversation window shows name of other user who is typing a response                       | D                           |                           |                          |                         |                                                      |
|          | IM message can be at least 256 characters in length                                         | M                           |                           |                          |                         |                                                      |
|          | At least fifteen (15) active IM Conversations                                               | M                           |                           |                          |                         |                                                      |
|          |                                                                                             |                             |                           |                          |                         |                                                      |
|          |                                                                                             |                             |                           |                          |                         |                                                      |
|          | <b>Advanced IM Functionality</b>                                                            |                             |                           |                          |                         |                                                      |
|          | IM can be initiated from Presence indicator in IM buddy list                                | M                           |                           |                          |                         |                                                      |
|          | IM can be initiated from Presence indicator in e-mail message.                              | M                           |                           |                          |                         |                                                      |
|          | E-mail subject is added to IM Conversation window if IM session started from e-mail message | M                           |                           |                          |                         |                                                      |
|          | IM can be initiated from Presence indicator in Microsoft Office documents or applications   | M                           |                           |                          |                         |                                                      |

| Category | Category Capability                                                                                                                         | Mandatory or Desired M or D | Solution Provides? Y or N | (If Applicable) Quantity | Customization Required? | Explanations or Exceptions or Scope of Customization |
|----------|---------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|---------------------------|--------------------------|-------------------------|------------------------------------------------------|
|          | IM can be initiated from Presence indicator in Microsoft SharePoint, Lotus Quickr or other collaborative workspace. (List those supported.) | M                           |                           |                          |                         |                                                      |
|          | File Name or Workspace Name is added to IM Conversation Window if IM session is started from those environments                             | M                           |                           |                          |                         |                                                      |
|          | Incoming IM can be blocked by User's admin settings                                                                                         | M                           |                           |                          |                         |                                                      |
|          | Incoming IM can be blocked at least one of User's Presence settings                                                                         | M                           |                           |                          |                         |                                                      |
|          | User is provided with reports of numbers of IM's per day.                                                                                   | D                           |                           |                          |                         |                                                      |
|          | User is provided with a report or estimate of the time spent on IM for period of time.                                                      | D                           |                           |                          |                         |                                                      |
|          |                                                                                                                                             |                             |                           |                          |                         |                                                      |
|          |                                                                                                                                             |                             |                           |                          |                         |                                                      |
|          | <b>Enterprise Presence</b>                                                                                                                  |                             |                           |                          |                         |                                                      |
|          | <b>Basic Presence Functionality</b>                                                                                                         |                             |                           |                          |                         |                                                      |
|          | The status of each user is shown by a presence symbol to other system users or buddies                                                      | NA                          |                           |                          |                         |                                                      |
|          | Presence status provides for multiple states:                                                                                               | NA                          |                           |                          |                         |                                                      |
|          | Available or On-Line                                                                                                                        | M                           |                           |                          |                         |                                                      |
|          | Not Available or Off-Line                                                                                                                   | M                           |                           |                          |                         |                                                      |
|          | Do Not Disturb                                                                                                                              | M                           |                           |                          |                         |                                                      |
|          | Busy                                                                                                                                        | M                           |                           |                          |                         |                                                      |
|          | Away                                                                                                                                        | M                           |                           |                          |                         |                                                      |
|          | Lunch                                                                                                                                       | M                           |                           |                          |                         |                                                      |
|          | Be Right Back                                                                                                                               | M                           |                           |                          |                         |                                                      |
|          | Other indications (list in Explanations field)                                                                                              | D                           |                           |                          |                         |                                                      |
|          |                                                                                                                                             |                             |                           |                          |                         |                                                      |
|          |                                                                                                                                             |                             |                           |                          |                         |                                                      |
|          | <b>Advanced Presence Functionality</b>                                                                                                      |                             |                           |                          |                         |                                                      |

| Category | Category Capability                                                                             | Mandatory or Desired M or D | Solution Provides? Y or N | (If Applicable) Quantity | Customization Required? | Explanations or Exceptions or Scope of Customization |
|----------|-------------------------------------------------------------------------------------------------|-----------------------------|---------------------------|--------------------------|-------------------------|------------------------------------------------------|
|          | Selection or Hover over Presence symbol shows additional user status                            | M                           |                           |                          |                         |                                                      |
|          | Status info provided is:                                                                        | NA                          |                           |                          |                         |                                                      |
|          | Text version of status                                                                          | M                           |                           |                          |                         |                                                      |
|          | Calendar Status                                                                                 | M                           |                           |                          |                         |                                                      |
|          | Next Available Time                                                                             | M                           |                           |                          |                         |                                                      |
|          | Out of Office Message                                                                           | D                           |                           |                          |                         |                                                      |
|          | Click on Presence Symbol shows available communication options                                  | M                           |                           |                          |                         |                                                      |
|          | User can click on available option to launch communication                                      | M                           |                           |                          |                         |                                                      |
|          | Communication options provided (if shown) are:                                                  | D                           |                           |                          |                         |                                                      |
|          | IM Session                                                                                      | M                           |                           |                          |                         |                                                      |
|          | Voice IP Conversation                                                                           | M                           |                           |                          |                         |                                                      |
|          | Video IP Conversation                                                                           | D                           |                           |                          |                         |                                                      |
|          | File or Presentation Sharing (web conference)                                                   | M                           |                           |                          |                         |                                                      |
|          | File or Document Editing                                                                        | D                           |                           |                          |                         |                                                      |
|          | Presence Status is presented with User name in the following:                                   | NA                          |                           |                          |                         |                                                      |
|          | Microsoft Office Programs (Word, Excel, PowerPoint, SharePoint, Project)                        | D                           |                           |                          |                         |                                                      |
|          | E-mail Client (via PC client or browser) (list those supported).                                | M                           |                           |                          |                         |                                                      |
|          | Common view client (e.g. Microsoft Communicator, Lotus SameTime) in PC, Web and Mobile versions | M                           |                           |                          |                         |                                                      |
|          | User can have four (4) or more settings for level of info and comm'n options shown to others    | M                           |                           |                          |                         |                                                      |
|          | User can assign any other User to one of the info and communication settings                    | D                           |                           |                          |                         |                                                      |

| Category | Category Capability                                                                                                                           | Mandatory or Desired M or D | Solution Provides? Y or N | (If Applicable) Quantity | Customization Required? | Explanations or Exceptions or Scope of Customization |
|----------|-----------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|---------------------------|--------------------------|-------------------------|------------------------------------------------------|
|          | Setting will control the information shown to other users, including removing selected types of communications and blocking all communication | D                           |                           |                          |                         |                                                      |
|          | Report is available to user on time spent in each of the Presence states, by type of setting, if used                                         | M                           |                           |                          |                         |                                                      |
|          |                                                                                                                                               |                             |                           |                          |                         |                                                      |
|          |                                                                                                                                               |                             |                           |                          |                         |                                                      |
|          | <b>Enterprise IM/Presence Combined Functions</b>                                                                                              |                             |                           |                          |                         |                                                      |
|          | <b>Basic IM/Presence Functionality</b>                                                                                                        |                             |                           |                          |                         |                                                      |
|          | An integrated client for IM and Presence for PC, Web and mobile devices is provided.                                                          | M                           |                           |                          |                         |                                                      |
|          | The integrated client includes display, access and control of e-mail messaging, calendar, and tasks                                           | M                           |                           |                          |                         |                                                      |
|          | The User Profile for IM and Presence is maintained in a common Enterprise directory, such as Microsoft Active Directory or LDAP Directory     | M                           |                           |                          |                         |                                                      |
|          |                                                                                                                                               |                             |                           |                          |                         |                                                      |
|          |                                                                                                                                               |                             |                           |                          |                         |                                                      |
|          | <b>Advanced IM/Presence Functionality</b>                                                                                                     |                             |                           |                          |                         |                                                      |
|          | User Profile can include other attributes such as skill, organization, team(s), location, etc.                                                | M                           |                           |                          |                         |                                                      |
|          | IM/Presence Entries can be created using aliases.                                                                                             | M                           |                           |                          |                         |                                                      |
|          | IM/Presence Entries can be created using aliases for a group of users.                                                                        | M                           |                           |                          |                         |                                                      |
|          | Presence for Alias for group of users will show best availability of any one member of the group                                              | D                           |                           |                          |                         |                                                      |

| Category | Category Capability                                                                                                         | Mandatory or Desired M or D | Solution Provides? Y or N | (If Applicable) Quantity | Customization Required? | Explanations or Exceptions or Scope of Customization |
|----------|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------|---------------------------|--------------------------|-------------------------|------------------------------------------------------|
|          | Membership in an Alias group can be maintained automatically by the system (e.g. all Sales)                                 | M                           |                           |                          |                         |                                                      |
|          | <b>Compliance Functions</b>                                                                                                 |                             |                           |                          |                         |                                                      |
|          | Ability to log and archive all IM messages                                                                                  | M                           |                           |                          |                         |                                                      |
|          | Ability to control logging only by administrator to assure full compliance                                                  | M                           |                           |                          |                         |                                                      |
|          | Ability to specify which users will be logged and archived                                                                  | M                           |                           |                          |                         |                                                      |
|          | Ability to search and retrieve content from archive based on date, sender/recipient, or content                             | M                           |                           |                          |                         |                                                      |
|          |                                                                                                                             |                             |                           |                          |                         |                                                      |
|          |                                                                                                                             |                             |                           |                          |                         |                                                      |
|          | <b>IM/Presence Automation and Interoperation</b>                                                                            |                             |                           |                          |                         |                                                      |
|          | Presence status can be accessed by a software interface                                                                     | M                           |                           |                          |                         |                                                      |
|          | Presence status can be adjusted via a software interface (e.g. set a user to "busy" while working on an application alert). | M                           |                           |                          |                         |                                                      |
|          | Software can make structured inquiries against profile information (e.g. find available service rep in Topeka).             | D                           |                           |                          |                         |                                                      |
|          | Software can initiate and manage an IM session to any user, local or Federated                                              | D                           |                           |                          |                         |                                                      |
|          | Software can manage communications actions (see below)                                                                      | D                           |                           |                          |                         |                                                      |
|          | Presence and IM functions can be embedded in other Windows-based programs or browser interfaces                             | D                           |                           |                          |                         |                                                      |

| Category | Category Capability                                                                              | Mandatory or Desired M or D | Solution Provides? Y or N | (If Applicable) Quantity | Customization Required? | Explanations or Exceptions or Scope of Customization |
|----------|--------------------------------------------------------------------------------------------------|-----------------------------|---------------------------|--------------------------|-------------------------|------------------------------------------------------|
|          | Toolkit is available for control of IM/Presence functions                                        | D                           |                           |                          |                         |                                                      |
|          | Sample Functions are available for IM/Presence controls and applications                         | D                           |                           |                          |                         |                                                      |
|          |                                                                                                  |                             |                           |                          |                         |                                                      |
|          | <b>IM/Presence Federation</b>                                                                    |                             |                           |                          |                         |                                                      |
|          | IM/Presence system can link with other IM systems (known as Federation)                          | M                           |                           |                          |                         |                                                      |
|          | Standards-based IM/Presence link is supported with:                                              | NA                          |                           |                          |                         |                                                      |
|          | Microsoft Live Communications Server 2005 and Office Communications Server 2007                  | M                           |                           |                          |                         |                                                      |
|          | IBM Lotus SameTime Release 7.5 or higher                                                         | M                           |                           |                          |                         |                                                      |
|          | Microsoft Live Messenger                                                                         | M                           |                           |                          |                         |                                                      |
|          | AOL Instant Messaging                                                                            | M                           |                           |                          |                         |                                                      |
|          | Yahoo! Instant Messaging                                                                         | M                           |                           |                          |                         |                                                      |
|          | Google IM/Presence                                                                               | D                           |                           |                          |                         |                                                      |
|          | Others (e.g. Jabber, IP Telephony provider IM products). (Describe in Explanations column)       | D                           |                           |                          |                         |                                                      |
|          | Users of Federated systems can be included in Users buddy list                                   | M                           |                           |                          |                         |                                                      |
|          | Presence of Users on Federated Systems can be seen and is up to date within one-minute interval. | M                           |                           |                          |                         |                                                      |
|          | User can conduct separate IM conversations with multiple other Federated IM system users.        | M                           |                           |                          |                         |                                                      |

| Category | Category Capability                                                                                                                                    | Mandatory or Desired M or D | Solution Provides? Y or N | (If Applicable) Quantity | Customization Required? | Explanations or Exceptions or Scope of Customization |
|----------|--------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|---------------------------|--------------------------|-------------------------|------------------------------------------------------|
|          | User can include IM users from own IM system and more than one Federated IM system in a single conversation.                                           | M                           |                           |                          |                         |                                                      |
|          |                                                                                                                                                        |                             |                           |                          |                         |                                                      |
|          |                                                                                                                                                        |                             |                           |                          |                         |                                                      |
|          |                                                                                                                                                        |                             |                           |                          |                         |                                                      |
|          | <b>Enhanced Voice/Video UC Capabilities</b>                                                                                                            |                             |                           |                          |                         |                                                      |
|          | <b>Communication Client</b>                                                                                                                            |                             |                           |                          |                         |                                                      |
|          | Control communication functions from a consistent Client interface on PC, Web Interface, and Mobile wireless device. (E.g. UC client, softphone, etc.) | NA                          |                           |                          |                         |                                                      |
|          | If Communications Client is not capable of VoIP, then provide control of alternate end point (cell phone, PSTN or PBX phone)                           | NA                          |                           |                          |                         |                                                      |
|          | User interface provides for easy display and control of communications.                                                                                | NA                          |                           |                          |                         |                                                      |
|          | Describe or provide collateral media to illustrate ease and range of Client functionality                                                              | NA                          |                           |                          |                         |                                                      |
|          |                                                                                                                                                        |                             |                           |                          |                         |                                                      |
|          | <b>Basic Call (Session) Controls</b>                                                                                                                   |                             |                           |                          |                         |                                                      |
|          | Provide all of the following call controls for Voice, Video, or Web sessions<br>Note: Call = Session for this section.                                 | NA                          |                           |                          |                         |                                                      |
|          | Initiate Call                                                                                                                                          | NA                          |                           |                          |                         |                                                      |
|          | Conduct Call for unlimited duration                                                                                                                    | NA                          |                           |                          |                         |                                                      |
|          | Terminate (hang up) Call                                                                                                                               | NA                          |                           |                          |                         |                                                      |
|          | Transfer Call                                                                                                                                          | NA                          |                           |                          |                         |                                                      |
|          | Conference Others into Call                                                                                                                            | NA                          |                           |                          |                         |                                                      |
|          | Place Call on Hold                                                                                                                                     | NA                          |                           |                          |                         |                                                      |
|          | Divert Incoming Call if busy                                                                                                                           | NA                          |                           |                          |                         |                                                      |

| Category | Category Capability                                                                                                                                                                                   | Mandatory or Desired M or D | Solution Provides? Y or N | (If Applicable) Quantity | Customization Required? | Explanations or Exceptions or Scope of Customization |
|----------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|---------------------------|--------------------------|-------------------------|------------------------------------------------------|
|          | Provide incoming caller ID information if available                                                                                                                                                   | NA                          |                           |                          |                         |                                                      |
|          | Divert Incoming Call if no-answer                                                                                                                                                                     | NA                          |                           |                          |                         |                                                      |
|          | Transmit Incoming Call information with Call if diverted (to maximum extent possible)                                                                                                                 | NA                          |                           |                          |                         |                                                      |
|          | Provide for connection to existing voice mail system with sufficient information to connect to correct mailbox and to allow transfer to Operator                                                      | NA                          |                           |                          |                         |                                                      |
|          |                                                                                                                                                                                                       |                             |                           |                          |                         |                                                      |
|          |                                                                                                                                                                                                       |                             |                           |                          |                         |                                                      |
|          | <b>Advanced Call Controls</b>                                                                                                                                                                         |                             |                           |                          |                         |                                                      |
|          | Launch a call to a group of persons                                                                                                                                                                   | NA                          |                           |                          |                         |                                                      |
|          | Ability to initiate a call automatically from a calendar entry or scheduled task                                                                                                                      | NA                          |                           |                          |                         |                                                      |
|          | Provide indication if incoming call is a manual or software-controlled transfer                                                                                                                       | NA                          |                           |                          |                         |                                                      |
|          | Provide indication if incoming call is from presence, IM, e-mail or file sharing/workspace of originating party                                                                                       | NA                          |                           |                          |                         |                                                      |
|          | Initiate a Call from any user identity format that is known to the enterprise directory (e.g. Active Directory) or personal contacts, such as name, phone numbers, IM name, e-mail address or handle. | NA                          |                           |                          |                         |                                                      |
|          |                                                                                                                                                                                                       |                             |                           |                          |                         |                                                      |
|          |                                                                                                                                                                                                       |                             |                           |                          |                         |                                                      |
|          |                                                                                                                                                                                                       |                             |                           |                          |                         |                                                      |
|          |                                                                                                                                                                                                       |                             |                           |                          |                         |                                                      |
|          | <b>Call Routing</b>                                                                                                                                                                                   |                             |                           |                          |                         |                                                      |

| Category | Category Capability                                                                                                                   | Mandatory or Desired M or D | Solution Provides? Y or N | (If Applicable) Quantity | Customization Required? | Explanations or Exceptions or Scope of Customization |
|----------|---------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|---------------------------|--------------------------|-------------------------|------------------------------------------------------|
|          | Route incoming calls to alternate numbers under user or administrator control                                                         | NA                          |                           |                          |                         |                                                      |
|          | Route incoming calls to varying other numbers based on situation (busy, no answer, caller identity, presence status, etc.)            | NA                          |                           |                          |                         |                                                      |
|          | Route incoming calls under software control (e.g. based on business processes, rules)                                                 | NA                          |                           |                          |                         |                                                      |
|          |                                                                                                                                       |                             |                           |                          |                         |                                                      |
|          |                                                                                                                                       |                             |                           |                          |                         |                                                      |
|          |                                                                                                                                       |                             |                           |                          |                         |                                                      |
|          | <b>Call Escalation and De-Escalation</b>                                                                                              |                             |                           |                          |                         |                                                      |
|          | Ability to move a call from one state to another (see cases below) as supported by the end points without ending the call or session. | NA                          |                           |                          |                         |                                                      |
|          | Cases include:                                                                                                                        | NA                          |                           |                          |                         |                                                      |
|          | Presence to IM                                                                                                                        | NA                          |                           |                          |                         |                                                      |
|          | IM to Voice Call                                                                                                                      | NA                          |                           |                          |                         |                                                      |
|          | Voice call to Video Call                                                                                                              | NA                          |                           |                          |                         |                                                      |
|          | Voice or Video Call to Web Conference                                                                                                 | NA                          |                           |                          |                         |                                                      |
|          | IM to Video Call                                                                                                                      | NA                          |                           |                          |                         |                                                      |
|          | IM to Web Conference                                                                                                                  | NA                          |                           |                          |                         |                                                      |
|          | Ability to revert to prior call levels without ending the call or session.                                                            | NA                          |                           |                          |                         |                                                      |
|          | Cases include:                                                                                                                        | NA                          |                           |                          |                         |                                                      |
|          | End Web Session but retain voice or video call                                                                                        | NA                          |                           |                          |                         |                                                      |
|          | End video call but retain voice call                                                                                                  | NA                          |                           |                          |                         |                                                      |
|          | End Voice or Video Call, but retain IM session                                                                                        | NA                          |                           |                          |                         |                                                      |
|          | End Web Session but retain IM Session                                                                                                 | NA                          |                           |                          |                         |                                                      |
|          |                                                                                                                                       |                             |                           |                          |                         |                                                      |
|          |                                                                                                                                       |                             |                           |                          |                         |                                                      |
|          | <b>End Points</b>                                                                                                                     |                             |                           |                          |                         |                                                      |

| Category | Category Capability                                                                                                                                                          | Mandatory or Desired M or D | Solution Provides? Y or N | (If Applicable) Quantity | Customization Required? | Explanations or Exceptions or Scope of Customization |
|----------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|---------------------------|--------------------------|-------------------------|------------------------------------------------------|
|          | Ability to purchase end points (PCs, Phones, Wireless Devices) from any qualified source.                                                                                    | NA                          |                           |                          |                         |                                                      |
|          | Please provide list or URL to list of qualified suppliers of end points for the proposed system.                                                                             | NA                          |                           |                          |                         | URL or other source:                                 |
|          | Please provide specifications of minimum end point requirements for the proposed system                                                                                      | NA                          |                           |                          |                         | URL or other source:                                 |
|          | Availability of IP Telephony end point with traditional telephone format (12-key pad, multiple line appearance and function buttons) with visual IP programmable IP display. |                             |                           |                          |                         |                                                      |
|          | Please provide list or URL to list of supported IP Telephony end points for system.                                                                                          |                             |                           |                          |                         |                                                      |
|          |                                                                                                                                                                              |                             |                           |                          |                         |                                                      |
|          |                                                                                                                                                                              |                             |                           |                          |                         |                                                      |
|          | <b>Accessories</b>                                                                                                                                                           |                             |                           |                          |                         |                                                      |
|          | Ability to purchase communication accessories such as headsets, USB handsets, speakerphones, etc. from any qualified source.                                                 | NA                          |                           |                          |                         |                                                      |
|          | Please provide list or URL to list of qualified suppliers of end points for the proposed system.                                                                             | NA                          |                           |                          |                         |                                                      |
|          | Please provide specifications of minimum end point requirements (protocols, qualification, etc.) for the proposed system                                                     | NA                          |                           |                          |                         |                                                      |
|          | Indicate availability of API and/or Toolkits for application use of IP Telephony end points for display and/or input.                                                        | NA                          |                           |                          |                         |                                                      |

| Category | Category Capability                                                                                                                                                                            | Mandatory or Desired M or D | Solution Provides? Y or N | (If Applicable) Quantity | Customization Required? | Explanations or Exceptions or Scope of Customization |
|----------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|---------------------------|--------------------------|-------------------------|------------------------------------------------------|
|          |                                                                                                                                                                                                |                             |                           |                          |                         |                                                      |
|          |                                                                                                                                                                                                |                             |                           |                          |                         |                                                      |
|          | <b>PBX and PSTN Integration</b>                                                                                                                                                                |                             |                           |                          |                         |                                                      |
|          | Ability to receive and place calls from the proposed UC solution into the Public Switched telephone network or to a PBX system through standard interfaces.                                    | NA                          |                           |                          |                         |                                                      |
|          | Provide specifications or URL to specifications of supported interface protocols and gateway devices needed for those protocols, at least for all protocols and devices proposed.              | NA                          |                           |                          |                         |                                                      |
|          | Ability, in addition to placing and receiving calls as above, to integrate with the PBX systems used in our Company using CSTA controls.                                                       | NA                          |                           |                          |                         |                                                      |
|          | Provide specifications or URL to specifications of PBX models supported with CSTA interfacing and the gateways needed for those protocols, at least for all protocols and devices proposed.    | NA                          |                           |                          |                         |                                                      |
|          | Ability, as an alternative to the options above, to integrate with the PBX systems used in our Company and/or with the PSTN using Session Initiation Protocol (SIP).                           | NA                          |                           |                          |                         |                                                      |
|          | Provide specifications or URL to specifications of PBX models supported with SIP. Also, indicate if SIP interfaces to the PSTN are supported, at least for all protocols and devices proposed. | NA                          |                           |                          |                         |                                                      |

| Category | Category Capability                                                                                                                                                                                                                                | Mandatory or Desired M or D | Solution Provides? Y or N | (If Applicable) Quantity | Customization Required? | Explanations or Exceptions or Scope of Customization |
|----------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|---------------------------|--------------------------|-------------------------|------------------------------------------------------|
|          | Ability, using CSTA or SIP, to provide the following:                                                                                                                                                                                              |                             |                           |                          |                         |                                                      |
|          | Control of desktop phone (TDM or IP) from UC System software Client, e.g. to launch calls from the software client yet have the voice link through the PBX phone.                                                                                  | NA                          |                           |                          |                         |                                                      |
|          | Ability for incoming calls to ring on the desk phone as well as the PC Client and be answered on either device with voice link through the PBX phone.                                                                                              | NA                          |                           |                          |                         |                                                      |
|          | Presence integration to provide presence status updates to the UC System/Client based on phone status on the PBX system                                                                                                                            | NA                          |                           |                          |                         |                                                      |
|          | Ability to control the PBX and the interface to the PSTN so that incoming calls can ring simultaneously on multiple end-points as specified by the user and allow the call to be answered on any end point and terminate ringing on other devices. | NA                          |                           |                          |                         |                                                      |
|          |                                                                                                                                                                                                                                                    |                             |                           |                          |                         |                                                      |
|          |                                                                                                                                                                                                                                                    |                             |                           |                          |                         |                                                      |
|          | <b>Security</b>                                                                                                                                                                                                                                    |                             |                           |                          |                         |                                                      |
|          | Ability to encrypt all communications between user end points on the UC System for capable end points.                                                                                                                                             | NA                          |                           |                          |                         |                                                      |
|          | Ability to support encrypted communications from authorized users on qualified devices that are outside our Company firewall.                                                                                                                      | NA                          |                           |                          |                         |                                                      |

| Category | Category Capability                                                                                                                                                     | Mandatory or Desired M or D | Solution Provides? Y or N | (If Applicable) Quantity | Customization Required? | Explanations or Exceptions or Scope of Customization |
|----------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|---------------------------|--------------------------|-------------------------|------------------------------------------------------|
|          | Ability to support secure, encrypted communications as above without requiring separate VPN technology                                                                  | NA                          |                           |                          |                         |                                                      |
|          | Provide a list or URL to a list of end point types that can be secured as above, at least as proposed.                                                                  | NA                          |                           |                          |                         |                                                      |
|          |                                                                                                                                                                         |                             |                           |                          |                         |                                                      |
|          |                                                                                                                                                                         |                             |                           |                          |                         |                                                      |
|          | <b>Logging and Reporting</b>                                                                                                                                            |                             |                           |                          |                         |                                                      |
|          | Ability to log communication events and related details, including duration, participants, subject, links to documents, media invoked, methods of call initiation, etc. | NA                          |                           |                          |                         |                                                      |
|          | Ability to provide reports on the usage of the system for users, at their request (self service preferred) and for system administrators.                               | NA                          |                           |                          |                         |                                                      |
|          | Provide reporting on time-based periods (weeks, months) for trend analysis                                                                                              | NA                          |                           |                          |                         |                                                      |
|          | Ability to provide custom reporting with graphical interface report definition against any data logged as above.                                                        |                             |                           |                          |                         |                                                      |
|          |                                                                                                                                                                         |                             |                           |                          |                         |                                                      |
|          |                                                                                                                                                                         |                             |                           |                          |                         |                                                      |
|          | <b>Server-Based, On-Premise Voice, Video and Web Conferencing</b>                                                                                                       |                             |                           |                          |                         |                                                      |
|          | <b>Conferencing Capabilities</b>                                                                                                                                        |                             |                           |                          |                         |                                                      |
|          |                                                                                                                                                                         |                             |                           |                          |                         |                                                      |
|          | Availability of a VoIP-capable conferencing client for both PC and Web interfaces                                                                                       | NA                          |                           |                          |                         |                                                      |

| Category | Category Capability                                                                                                                                                                                                                                             | Mandatory or Desired M or D | Solution Provides? Y or N | (If Applicable) Quantity | Customization Required? | Explanations or Exceptions or Scope of Customization |
|----------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|---------------------------|--------------------------|-------------------------|------------------------------------------------------|
|          | Availability of a Web-based VoIP conferencing client that can be used or published to invitees that are not administered users of the conferencing system, whether inside or outside the firewall and known or not known to the system or enterprise directory. | NA                          |                           |                          |                         |                                                      |
|          | Ability of Web Conferencing system to be on-premises or hosted and for web client to work seamlessly with both premise-based and hosted version of the conferencing system.                                                                                     | NA                          |                           |                          |                         |                                                      |
|          | Ability to form a voice, video or web conference by adding users to a 2-party call or session.                                                                                                                                                                  | NA                          |                           |                          |                         |                                                      |
|          | Ability to add modes to a multi-party conference, i.e. to add video into a voice call or voice into a web session without dropping and restarting the session                                                                                                   | NA                          |                           |                          |                         |                                                      |
|          | Ability to schedule a conference in advance and send invitations to all participants through standard calendar (Microsoft Outlook, Lotus Notes, etc.) functions.                                                                                                | NA                          |                           |                          |                         |                                                      |
|          | Ability for users to access the conference using VoIP through a secure web client URL included in the invitation.                                                                                                                                               | NA                          |                           |                          |                         |                                                      |

| Category | Category Capability                                                                                                                                                                                          | Mandatory or Desired M or D | Solution Provides? Y or N | (If Applicable) Quantity | Customization Required? | Explanations or Exceptions or Scope of Customization |
|----------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|---------------------------|--------------------------|-------------------------|------------------------------------------------------|
|          | Ability to include VoIP and Video participants that are outside the enterprise firewall, are not part of the UC System, but are known to the enterprise directory such as Active Directory or LDAP Directory | NA                          |                           |                          |                         |                                                      |
|          | Ability to include VoIP participants that are outside the enterprise firewall, are not part of the UC System, and are not known to the enterprise directory such as Active Directory                         | NA                          |                           |                          |                         |                                                      |
|          | Ability to manage permissions and roles in conference under meeting organizer's control                                                                                                                      | NA                          |                           |                          |                         |                                                      |
|          | Ability to restrict roles in conference based on participant's status relative to firewall position and identity status.                                                                                     | NA                          |                           |                          |                         |                                                      |
|          | Ability to include standard PSTN and PBX users in voice portion of conferences.                                                                                                                              | NA                          |                           |                          |                         |                                                      |
|          | Specify gateways required (if any) for the proposed configuration.                                                                                                                                           | NA                          |                           |                          |                         |                                                      |
|          | Ability to record any conference session                                                                                                                                                                     | NA                          |                           |                          |                         |                                                      |
|          | Ability to share files and other content from a collaboration workspace system such as SharePoint, IBM Quickr, etc. during conference.                                                                       | NA                          |                           |                          |                         |                                                      |
|          | Ability to integrate with existing conferencing systems at Company (see list in RFP).                                                                                                                        | NA                          |                           |                          |                         |                                                      |
|          | Ability to log conferencing activity for billing and usage analysis purposes.                                                                                                                                | NA                          |                           |                          |                         |                                                      |

| Category | Category Capability                                                                                                                                          | Mandatory or Desired M or D | Solution Provides? Y or N | (If Applicable) Quantity | Customization Required? | Explanations or Exceptions or Scope of Customization |
|----------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|---------------------------|--------------------------|-------------------------|------------------------------------------------------|
|          | Ability to report on conferencing system usage for User feedback, trend analysis and ROI calculation                                                         | NA                          |                           |                          |                         |                                                      |
|          |                                                                                                                                                              |                             |                           |                          |                         |                                                      |
|          |                                                                                                                                                              |                             |                           |                          |                         |                                                      |
|          | <b>Communications Enabled Workflow Applications</b>                                                                                                          |                             |                           |                          |                         |                                                      |
|          | <b>Capabilities</b>                                                                                                                                          |                             |                           |                          |                         |                                                      |
|          | Ability to access any of the communication functions of the UC System from software-based business processes and applications.                               | NA                          |                           |                          |                         |                                                      |
|          | Ability to control communication functions as part of business processes or applications, preferably from the user interface of that process or application. | NA                          |                           |                          |                         |                                                      |
|          | Ability to access or invoke business processes or applications from the communication functions comprising the UC System.                                    | NA                          |                           |                          |                         |                                                      |
|          | Ability to control the business processes or applications from the UC System user interface/client.                                                          | NA                          |                           |                          |                         |                                                      |
|          | Availability of prepared and pre-tested interface modules between the UC System and the business applications at Company                                     | NA                          |                           |                          |                         |                                                      |
|          | Availability of tools, toolkits, SDKs and APIs for use in the integration of communications functions of the UC system to business processes.                | NA                          |                           |                          |                         |                                                      |

| Category | Category Capability                                                                                                                                          | Mandatory or Desired M or D | Solution Provides? Y or N | (If Applicable) Quantity | Customization Required? | Explanations or Exceptions or Scope of Customization |
|----------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|---------------------------|--------------------------|-------------------------|------------------------------------------------------|
|          | Availability of training for Company personnel in use of the Tool, Toolkits, SDKs and APIs.                                                                  | NA                          |                           |                          |                         |                                                      |
|          | Availability of a community or VARs, Integrators, and Developers to assist Company with integrating communications into business processes and applications. | NA                          |                           |                          |                         |                                                      |
|          | Ability to establish software-based rules for communications functions.                                                                                      | NA                          |                           |                          |                         |                                                      |
|          | Ability of rules to be managed dynamically by software programs                                                                                              | NA                          |                           |                          |                         |                                                      |
|          | Ability of rules to be established by administrators via configurable templates.                                                                             | NA                          |                           |                          |                         |                                                      |
|          | Ability of rules to manage real-time events (calls, session lengths, conferencing, etc.)                                                                     | NA                          |                           |                          |                         |                                                      |
|          | Ability of rules to manage non-real-time events (message queues, alerts, auto-replies, etc.)                                                                 | NA                          |                           |                          |                         |                                                      |
|          |                                                                                                                                                              |                             |                           |                          |                         |                                                      |
|          | <b>Unified Messaging Options</b>                                                                                                                             |                             |                           |                          |                         |                                                      |
|          | <b>Capabilities</b>                                                                                                                                          |                             |                           |                          |                         |                                                      |
|          | Provide telephone call answering equivalent to or better than our Company's current system.                                                                  | NA                          |                           |                          |                         |                                                      |
|          | Provide voice messaging functionality equivalent to or better than our Company's current system.                                                             | NA                          |                           |                          |                         |                                                      |
|          | Provide option to store messages in Enterprise e-mail store (Exchange, Domino), if desired.                                                                  | NA                          |                           |                          |                         |                                                      |

| Category | Category Capability                                                                    | Mandatory or Desired M or D | Solution Provides? Y or N | (If Applicable) Quantity | Customization Required? | Explanations or Exceptions or Scope of Customization |
|----------|----------------------------------------------------------------------------------------|-----------------------------|---------------------------|--------------------------|-------------------------|------------------------------------------------------|
|          | Provide option to store messages in independent message store , if desired.            | NA                          |                           |                          |                         |                                                      |
|          | Option to intermix e-mail or independent store on user or class basis.                 | NA                          |                           |                          |                         |                                                      |
|          | Message Headers can be displayed on visual devices -- PC, browser, mobile device       | NA                          |                           |                          |                         |                                                      |
|          | User can click on message header to hear voice message (via phone or PC-based device). | NA                          |                           |                          |                         |                                                      |
|          | Option for speech command interface for mobile users.                                  | NA                          |                           |                          |                         |                                                      |
|          | Speech interface has access to other information such as:                              | NA                          |                           |                          |                         |                                                      |
|          | Presence indication can be determined for any other system user.                       | NA                          |                           |                          |                         |                                                      |
|          | Listen, create and adjust calendar appointments                                        | NA                          |                           |                          |                         |                                                      |
|          | Access specific e-mail messages.                                                       | NA                          |                           |                          |                         |                                                      |
|          | Engage in an Instant Messaging chat via speech interface.                              | NA                          |                           |                          |                         |                                                      |
|          | Listen, create and adjust Tasks                                                        | NA                          |                           |                          |                         |                                                      |
|          | Change user settings                                                                   | NA                          |                           |                          |                         |                                                      |
|          | End of Speech Features                                                                 |                             |                           |                          |                         |                                                      |
|          | "Find Me" option for callers who land on UM system (ring no answer)                    | NA                          |                           |                          |                         |                                                      |
|          | Presence indication of user is adjusted when logged in to UC system                    | NA                          |                           |                          |                         |                                                      |